Manitoba

We've got it Great!

Manitoba

88-05811/

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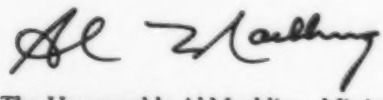
The marketing program, to promote Manitoba as a vacation destination to travel consumers, is taking a new direction. In line with that new thrust, support systems have been put in place. These support systems involve all areas of travel promotion. The Department has established a consultative partnership with the provincial travel industry. A program of community and media relations has been set in place in our target markets, and strategies have been developed to concentrate our resources in those areas where we can be assured of better returns. Long term plans for development of primary destinations are receiving special attention.

Bringing these changes into focus, starting in 1988, has required that the Department examine the variables—provincial, national, and international—that affect tourism. The Department has also given careful consideration to the promotional activities of its competitors—other provinces and states. Activities are being co-ordinated with Tourism Canada and the private and public sectors involved in Manitoba's tourism industry.

The intent of this publication is to outline the planning and marketing programs for 1988, touching on the longer range tourism development planning now in process. With this aggressive focus on consolidation of effort and resources, Travel Manitoba is making positive moves toward retaining and increasing its share of the travel market. While growth is not automatic, opportunities always exist for expansion, and Travel Manitoba is seizing every one of those opportunities.



The Honourable Al Mackling, Minister
Manitoba Department of
Business Development and Tourism

TOURISM TRENDS: AN OVERVIEW

CANADA

While the Canadian dollar has made some gains against the U.S. dollar, it has continued to decline against the Japanese yen and German mark. From the tourism industry viewpoint, this translates into improved traffic flows to Canada while deterring many Canadian would-be travellers, especially in the middle to lower income range.

Three important aspects of the current economic situation with implications for Manitoba tourism in 1988 bear examination. The first is the continuing importance of VFR travel segment (visiting friends and relatives). The second is the projection of more discretionary income being allocated by Canadians to travel. Finally, there is the continued increase in the number of upper income Canadians travelling outside of Canada.

U.S.A.

The recent contraction of the U.S. financial markets will likely have a dampening effect on consumer spending. However, travel remains a high-priority item with the growing youth and senior consumer market groups throughout the U.S.A.

It is worth noting that in an election year, U.S. citizens tend to reduce foreign travel. But, with the continuing U.S./Canadian exchange differential, Canada becomes a very attractive tourist destination in terms of value for dollars spent. Projections indicate a continued modest growth rate in U.S. visitors to all Canadian markets, with emphasis on special interest and target markets such as nature self-education travel.

Canada received considerable U.S. media attention during the 1988 Winter Olympics. It is anticipated that this will result in spin-off travel to Canada which should benefit Manitoba to some degree. Of special interest in the nearby U.S. key markets of North Dakota and Minnesota, is the recent launch of a new Winnipeg tourism marketing initiative supported by the Canada-Manitoba Tourism Development Agreement. The focus of this marketing activity is to clearly position Winnipeg as *the* multicultural tourism destination, highlighting its diverse ethnic attractions and the Folklorama festival in particular. The dramatic growth in U.S. bus tours during 1987 indicates that Winnipeg and Manitoba are seen as desirable destinations for many U.S. visitors. In addition, the success of major promotions like the "Minneapolis Blitz" and the intensive effort given to mall shows, travel trade shows and related consumer venues is paying dividends with increased awareness for Manitoba as a vacation destination for U. . visitors in key markets.

MANI. OBA

Pleasure travel is the primary motivation for Manitoba residents within the province. By coincidence this exactly parallels the motivation of many U.S. visitors, especially those from primary markets. For Canadian primary markets, VFR travel (visiting friends and relatives) to Manitoba is more important, with the exception of Northwestern Ontario where personal trips are more prominent.

Manitoba has shown a sustained economic growth for the past several years, with the Conference Board of Canada predicting 3.0% growth in gross domestic product. When linked with one of Canada's lowest unemployment rates and a real growth of personal disposable income, the general economic factors favor steady growth for travel by Manitobans within the province in 1988. Unquestionably, Manitobans will continue to be in the majority, as they answer the call to action to visit their own province in ever-increasing numbers. This will result in increased competition for leisure spending and will definitely reflect a degree of in-province market segmentation as the needs of special groups become better defined. This will undoubtedly lead to a continued growth in the so-called mini vacation market for short-term three to five day package trips.

As the importance of tourism to the overall Manitoba economy gains recognition, so also is the need for increased inter-government co-operative activities. This in turn is linked to a wide ranging series of co-operative marketing and advertising initiatives with the private sector, with special emphasis on the importance of regional and special interest programs, such as senior touring. Clearly the family vacation market will continue to be Manitoba's single largest tourist market for provincial residents.

Travel Manitoba has adopted a very pro-active approach to the provision of timely information materials as the Department continues to fine-tune its publications and information programs, with a view to providing public service that is second to none in the Canadian tourism industry.

One important point to note in the Manitoba market is the growing trend away from traditional summer period vacations, with new interest in year-round vacation opportunities in all regions of the province. This provides a splendid opportunity to promote off-season and shoulder-season travel packages, focusing on single destination trips rather than the more traditional touring vacations.

The introduction of a Fall/Winter Co-op Advertising promotion in late 1987 focused on this year-round market potential, while giving special emphasis to winter-related mini-vacation opportunities.

In summation, Manitoba competes well among all income groups and competes best for trips of one week or less duration, in spite of strong competition from neighboring provinces.

In U.S. primary markets considerable opportunity exists to expand Manitoba's share of vital tourism markets, especially among younger, higher income households, seniors tours, outdoor recreation and specialty market groups motivated by clearly targeted vertical advertising and marketing initiatives.

Manitoba is being discovered as an unspoiled tourist destination by more and more people. Perhaps, in the long-term, the relatively slow but steady growth of the Province's tourism industry will soon put to rest the rather backhanded compliment that Manitoba is Canada's best kept tourism secret. By aggressively marketing Manitoba's exciting attractions, festivals, events and destinations in close co-operation with all components of the tourism industry, Manitoba will unquestionably achieve its aim of a $1 billion tourism industry by the year 2000.

TOURISM MARKETS AN OVERVIEW

On an annual basis, the Department reviews the performance of our different tourism markets and the trends in the markets in preparation for developing a thorough and effective marketing plan. By using the who, what, where, why and when approach, Travel Manitoba obtains pertinent information on the tourists who are currently visiting the province.

Where do Manitoba's tourists come from?
What do they do here?
Who are they?
When do they visit?
Why do they travel to Manitoba?

The information retrieved allows Travel Manitoba to devise a marketing plan to attract visitors on one hand and develop Manitoba's tourism products on the other.

WHERE DO THEY COME FROM?

Travel Manitoba has identified four geographic markets from which it actively solicits visitors. These markets have been refined on the basis of number of visitors and potential for growth.

1. **Primary Markets** —the nearest geographic jurisdictions from which Manitoba attracts visitors for general vacation trips. These regions provide the majority of travellers to and within Manitoba. They are Manitoba itself, Northwestern Ontario, Saskatchewan, Minnesota and North Dakota.
2. Next in importance as a source of visitors are the **Secondary Markets**, consisting of the remainder of Ontario, Alberta, British Columbia and Quebec, plus Illinois, Michigan, Wisconsin, Iowa, South Dakota and Nebraska. General vacation trips are still important from these areas, but selected specialty markets become more important than in the primary areas. The specialty markets include angling, wilderness adventures, meetings and conventions and bus tours.
3. **Emerging Markets** are those which indicate potential for future development, mostly on a specialty market basis. These include Texas, California and Colorado.
4. **A Tertiary Market** exists overseas in the United Kingdom, Germany and Japan. Again, these are most often specialty market segments. Marketing promotions and advertising targetted to specialty market development in these areas have received special attention in the past year; most recently with the Royal Winnipeg Ballet Pacific Rim Tour '88, and co-op advertising in Germany.

The following chart shows the relative value of each of these markets to Manitoba's tourism economy:

MARKET	1986 Destined Person Trip	1986 Revenue $ Million
PRIMARY	5,945,232	$320.5
SECONDARY	455,448	$ 92.0
EMERGING	39,740	$ 3.7
TERTIARY	15,212	$ 5.2

Of the total of 6,455,632 person trips from these markets, by far the largest number was generated by residents of Manitoba themselves. In 1986, residents made 5,068,000 trips within the province, each of which averaged 2.4 days in duration.

WHAT DO THEY DO HERE?

Information on the purpose of these trips made by travellers to Manitoba from the Primary Market areas helps Travel Manitoba in designing a marketing plan that will cater to that market. The majority of the trips by Manitobans within the province are discretionary trips; they are either pleasure trips or trips to visit friends and relatives. Trips by residents of Saskatchewan are most often made to visit friends and relatives. The residents of Northwestern Ontario are motivated almost equally by pleasure, visiting and personal reasons.

Residents of North Dakota and Minnesota travel to Manitoba primarily for pleasure.

WHO ARE THEY?

An understanding of the demographic characteristics of the travellers and the character of the pleasure trips they make helps in developing marketing strategies, in packaging travel experiences and in positioning our products.

Manitobans travelling on pleasure trips tend to be younger adults ranging in age from 20 to 44, with average to better levels of income and average to higher levels of education.

They tend to take day trips or weekend-length trips to private cottages, campgrounds and to visit friends and relatives. The majority of these trips are to destination areas in the Interlake or Eastman regions.

Pleasure travellers from Saskatchewan also tend to be younger adults with average income levels and average to higher levels of education. They make weekend or one week trips, visiting with friends and relatives, camping or using commercial accommodations. The trips are most often to the Parkland region, Westman or Winnipeg.

Pleasure travellers from Northwestern Ontario are younger adults with higher incomes and average to better education levels. They make weekend or one week trips to Winnipeg and use commercial accommodations or visit friends and relatives.

Patterns are somewhat different for American visitors. North Dakotans tend to be younger to mid-aged adults with higher incomes and education levels. These visitors most often make trips that last a day or weekend period, to Winnipeg and Western Manitoba. The majority of the overnight visitors use

Trip Purposes – Percent (1986)

PRIMARY MARKET	Pleasure	V.F.R.*	Business	Personal
Manitoba	42.0	28.5	15.0	14.0
Saskatchewan	32.2	37.7	20.3	9.8
Northwestern Ontario	32.7	28.4	24.0	26.5
N. Dakota Min.	53.1	17.5	17.6	11.4

commercial accommodations, with a significant minority using campgrounds.

Visitors from Minnesota are again somewhat different. They tend to be somewhat older, with seniors being an important component. They have high income levels and average to higher education levels. They make weekend or one week trips to Winnipeg, the North and the Interlake, and use commercial accommodations or campgrounds. Of special interest is the aggressive marketing program in Minneapolis-St. Paul.

WHEN DO THEY VISIT?

Using the Primary Market as the information source and focusing only on the pleasure trips, the distribution of trips throughout the year can be illustrated.

As expected, the third quarter of the year, July, August and September, accounts for the majority of the trips. Among Manitoba and Saskatchewan residents, over half of the trips are in this quarter. For residents of Northwestern Ontario, travel during the first and fourth quarters is relatively more important.

For visitors from North Dakota and Minnesota the second quarter, traditionally attractive to sports anglers, accounts for nearly 30 percent of trips while the third quarter accounts for 40 percent.

WHY DO THEY VISIT?

Manitoba has a vast diversity of appeals, attractions and enjoyment for residents and visitors. The natural landscape varies from seacoast to desert and from fertile prairie to the rugged Pre-Cambrian Shield. It includes forests, isolated lakes, white-sand beaches, full-service resorts and a wide range of recreational facilities. There are many thousands of reasons why visitors choose Manitoba as their pleasure trip destination. Shown below are the most prominent areas of interest and activity.

DESTINED PLEASURE TRIPS BY CALENDAR QUARTER—PERCENT (%)

Primary Market	First	Second	Third	Fourth
Manitoba	16	24	44	16
Saskatchewan	15	23	40	22
N.W. Ontario	24	19	30	27
North Dakota	16	28	35	21
Minnesota	8	20	48	24

***PERCENT OF VISITORS INCLUDED IN ACTIVITY**

Market	Special Events	Fishing	Sight Seeing	Visiting Friends/ Relatives	Outdoor Recreation	Shopping	Horse Races
SASK	13	11	53	61	17	16	2
N.W.ONT.	6	17	51	61	21	11	1
N. DAKOTA	12	5	53	61	15	11	1
MINN.	16	5	51	67	25	11	1
ALBERTA	8	5	51	61	15	11	1
B.C. CANADA	8	5	51	61	15	11	1
ONT.	8	5	51	61	15	11	1
QUE.	8	5	51	61	15	11	1
U.S.A.	8	5	51	61	15	11	1

*Percentages indicate visitor activity preferences, not visitor numbers

SUMMARY

1. The Primary Markets—Minnesota, Manitoba, North Dakota, Northwestern Ontario and Saskatchewan and our Secondary Markets provide the most attractive growth opportunities for 1988. Minnesota represents the most significant prospect for new growth.
2. Pleasure remains the principal motivation for trips to Manitoba among residents of the United States. In Canadian primary markets, visiting friends and relatives is a major travel motivater, and in Northwestern Ontario, personal trips focusing on the services in Winnipeg is an important element.
3. Visitors from the Canadian primary markets tend to be younger adults with better incomes and levels of education. The trips are one week or less in duration and are made primarily to the more popular destinations, including Winnipeg.
4. The U.S. primary market visitors to Manitoba are young to middle-aged, with a significant number of seniors. The visitors have better incomes and education levels, and the trips are one week or less in duration. The U.S. primary market visitors are important users of commercial accommodation.
5. The pleasure travel market consists of large mass segments motivated by sightseeing products in Winnipeg and in rural destinations, and a large outdoor recreation component. There are specialty market segments motivated by sports angling, special events and horse racing that tend to concentrate in particular geographic locales.

TOURISM ECONOMIC IMPACTS

The total expenditures in Manitoba by travellers in the Province and by residents reached $667.8 million in 1986. Of this amount, Manitobans spent $402.2 million. Other Canadians spent $160.9 million, U.S. residents spent $88.0 million and residents of other countries spent $16.7 million.

Non-Manitobans spent $265.6 million in the Province in 1986 while Manitobans spent $431.2 million outside of Manitoba for travel. The Province therefore, records a deficit of $165.6 million on tourism accounts.

While Manitoba will continue to see the winter traffic to sun destinations, aggressive marketing of Manitoba to Manitobans will have a positive impact on this deficit. Manitobans travelling in Manitoba continue to make impressive contributions to the overall provincial economy in terms of revenue, taxation and employment.

TOURISM SECTOR	1986* Provincial Receipts ($ Millions)	1986* Person Years of Employment Generated in Manitoba
Transportation	$318.2	2,200
Accommodations	84.5	3,400
Food/Beverage	144.1	5,800
Recreation & Entertainment	42.0	1,700
Other	79.0	4,400
Total Expenditures & Employment	$667.8	17,500

Government	1986* Estimated Tax Revenue Generated From Tourist Spending ($ Millions)
Federal	$ 81.2
Provincial	62.7
Municipal	32.3
TOTAL	$176.2

* 1987 figures currently being tabulated.

SUMMARY

1. Current strengths for Manitoba tourism lie in the natural resource base and man-made events and attractions in selected regions. There are identified product weaknesses in the accommodation, service and human resource sectors in rural Manitoba. Further development is required in industry organization.
2. Manitoba tourism products can best compete in the in-province Northwestern Ontario and North Dakota markets. Selected regional product strengths are competitive in Minnesota, Saskatchewan, Secondary and Emerging markets, generally on a specialty market basis.
3. Travel Manitoba can best and most economically influence the tourism industry by concentrating its resources on man-made attractions and events, accommodation facilities, human resources, industry organization and marketing/information systems. Primary product development opportunities exist in the areas of quality man-made attractions, accommodations, human resources and industry organization.
4. Primary development opportunities exist within regions identified as Tourism Destination Areas and in the development of specialty market products such as wilderness adventure, nature self-education, angling and meetings and conventions.
5. Manitoba records a deficit on travel accounts, largely because of the deficit with the other provinces and the U.S.
6. Tourism spending is both income and job intensive.

FOCUS

MARKETING

Marketing a product like Manitoba is an exciting challenge. First, we have to deal with perceived image vs reality; second, we have to convey to people, both within and outside our borders, the essence of Manitoba—its natural beauty and resources, its unparalleled ethnic and cultural diversity, its warm hospitality, its range of attractions and events; and third, we have to present Manitoba to Manitobans and non-Manitobans as a preferred alternative to other tourist destinations.

Every product—whether it is a soft drink, a copying machine or a province—has a life cycle that moves from introductory to competitive to mature. Once a product has reached maturity in the marketplace, it is time to initiate the new introductory phase of the product's life cycle. It is necessary to make a new generation of consumers aware of the product, its benefits and advantages. So it is with Manitoba. Recognizing the need for new strategies in old marketplaces, the Department undertook a developmental program with these objectives:

1) To determine the effects of past programs;
2) To achieve improved results within the budget;
3) To determine long range objectives for Travel Manitoba.

To achieve these three objectives, the Department retained an independent consultant to conduct research, survey the markets and the activities of competitors, to determine our primary markets, and to devise approaches to those markets that would allow the Department to concentrate its resources for optimum returns. The result of the work done is a plan that will market Manitoba boldly, using a focussed marketing strategy.

THE CONSULTATIVE PROCESS

In 1987 the Department retained a consulting company to explore opportunities for expansion of Manitoba's share of the travel market, and to assist in developing suitable short-term and long-term marketing and communications strategies for Travel Manitoba. The specific objectives were:

1) the development of broad strategies for positioning Manitoba in the tourism marketplace, and positioning Travel Manitoba's activities within the tourism industry;
2) The development of a short-term strategy based on priorization of expenditures;
3) The development of a market by market operational strategy for the 1988 marketing programs of Travel Manitoba;
4) The development of a long-term strategy with budget and growth implications.

Throughout the spring and early summer of 1987, the consulting group held meetings with the major tourism industry organizations in Manitoba. The consultants received valuable information, in-puts and feedback from the Tourism Industry Association of Manitoba (TIAM,) the Manitoba Lodge and Outfitters Association, the Manitoba Hotel Association, the Manitoba Restaurant and Food Services Association, the provincial and local chambers of commerce, the Winnipeg Visitors and Convention Bureau, to name just a few. The consultative process proved to be a healthy exercise. The associations and groups involved in tourism in Manitoba were pleased to have an opportunity to voice their opinions and concerns at an early developmental stage, to share their knowledge and to contribute to the Travel Manitoba program. Their input was extremely useful in planning the 1988 campaign for Travel Manitoba. Out of the consultative process, a plan was developed and its broadline recommendations have been put into effect.

RESULTS OF THE CONSULTATIVE PROCESS

The consultations proved fruitful in defining several areas that were of interest to the travel industry sectors in the province. They indicated that:

—They would like to be involved in the planning stages of Travel Manitoba campaigns, in order to have enough lead time to plan their involvement on a co-operative basis;

—Manitoba should be positioned as different from other travel jurisdictions. They recommended our differences—beaches, ethnic diversity, etc.—be used to create a lasting impression and to separate the province from other destinations;

—Promotional materials should be more product specific, and that images be reinforced with enough information for the potential tourist to make a decision to visit Manitoba;

—The exchange rate should be promoted more aggressively. The rate of exchange provides an opportunity to create a difference. They also indicated that since Minneapolitans in particular were more sophisticated and liable to spend more on a vacation, promotion of the exchange rate would be a positive drawing card because a Manitoba vacation would be cheaper;

—More emphasis should be placed on response mechanisms—i.e. toll free numbers, postage-paid cards and 24 hour telephone lines where they exist, to build up a source of direct mail opportunities;

—The toll free 'phone number should be prominent in television and radio commercials;

—Fulfillment materials should have same graphic identity as advertising to provide a unified look for Travel Manitoba;

—There needed to be a commitment to consistent theming.

BROADLINE RECOMMENDATIONS

In addition to the discussions with industry members, the consultants engaged in other survey and research activities. Tourism material was gathered from every province and state in Canada and the U.S., and market information was gathered from U.S. sources about particular target areas like Minneapolis. Past and recent research was examined to define and focus travel industry trends.

Several broadline recommendations came out of this process, as follows;

- —Forward planning must be even further advanced in very strategic terms;
- —Co-operative advertising is operationally sound where distribution is guaranteed, and is especially sound in vertical markets —i.e. angling, travel trade, meetings and convention planners;
- —Co-operative advertising can be well-received in markets where there is a need for detailed information, but less effectively used where image is the selling point;
- —The themeline used over the past two years should be used again for in-province and Canadian market advertising. The themeline developed by Tourism Canada—'Your world next door.'—should be modified for use in Manitoba's American markets, since the line is familiar and has a high recognition factor. Arrangements have been made with Tourism Canada for a modified version of the themeline to be used in Manitoba's U.S. advertising;
- —It was determined that the Minneapolis market holds the greatest potential for growth, with a population of almost three million reached by the Twin Cities media coverage. It was also determined that 80% of Minneapolitans favour outdoor or outdoor-related vacation opportunities, while the remaining 20% are interested in cultural and/or urban vacation experiences. A substantial media campaign will be launched in the Twin Cities, as a prime market area. The emphasis placed on Minneapolis can be supported further by the fact that Manitoba can offer Minneapolitans the vacation they want, without having them travel too far;
- —Fulfillment publications could be reduced in number, with some pieces being incorporated into others. This would cut down on cost and bulk, and offer an opportunity for add-on promotion. For instance, if an angling enthusiast ordered a copy of the Lodges and Outfitters publication, he/she would also receive the Accommodations Guide, which would make him/her aware that Manitoba has four star hotels, as well as four star fishing lodges;
- —Fulfillment pieces should be designed with the same graphic identity as the lead generation pieces in newspaper, inserts and magazines;
- —The development of a targetted direct-mail program, based on existing information from past respondents and other sources, should be initiated.

1988 ADVERTISING PROGRAM

The advertising in the Minneapolis-St. Paul market will be hard-hitting, lead generative and image-related. Instead of fragmenting the approach in a wide range of media, the campaign is concentrated in television and in three newspaper inserts, with strong visual images of Manitoba carrying the Manitoba message. The Manitoba message is further enhanced by a very credible spokesman, Bud Grant, the former coach of the Winnipeg Blue Bombers and the Minnesota Vikings, and now a consultant to the Vikings organization.

Starting in the middle of March, and running into April and May, when Minneapolitans are planning their summer vacations, Travel Manitoba's television commercials will portray Manitoba as a destination that offers Minneapolitans the vacation style they enjoy. The three inserts each focus on aspects of Manitoba—the first promotes our beaches and camping holidays, the second features the great diversity of Manitoba's landscape and the wide range of activities and events, and the third centres on Winnipeg as an urban/arts-culture destination.

Underscoring the paid media campaign, there will be increased community and media relations activity—in the form of writers' tours, targetted press releases and static displays in high traffic areas—in an effort to educate and inform the Minneapolis target market about Manitoba as a vacation destination.

The advertising program for Manitoba is different to that in the Minneapolis market. Manitobans will be encouraged to visit other places in their home province, to see what Manitoba has to offer. Manitobans take great pride in their province. Coupled with that pride, is the realistic understanding that a vacation in Manitoba offers a diversity of activities and experiences for vacationers.

This year, Manitobans are being urged to 'Get to know your Manitoba'. Advertising will be carried on television, in radio, and in print, in the form of three newspaper inserts. The inserts will carry co-operative advertising, with space sold to tourism-related businesses.

The three Manitoba inserts will be information-specific. The first insert deals with Manitoba's festivals and fairs, the second with the Manitoba outside Winnipeg, and the third highlights Winnipeg and Brandon as vacation destinations. Research indicated that Bud Grant has great credibility in Manitoba, as well as in Minneapolis, and he will be spokesman for the province in television and radio. Radio commercials will be calendar-style throughout the summer, promoting the various events taking place through the province.

Co-op campaigns will also be conducted in Saskatchewan, North Dakota/Northern Minnesota and in Northwestern Ontario. The Saskatchewan campaign will comprise one newspaper insert—on festivals and fairs, co-operative print advertising and radio.

In North Dakota/Northwestern Minnesota, the campaign will also use newspaper insert—on our cities, co-operative print advertising and radio.

Northwestern Ontarians will be invited to sample our cities via newspaper insert, co-operative print advertising and radio.

The extra-province promotion concentrates its messages on the product that appeals to the various areas. In Manitoba, the advertising program appeals to home pride and gives reasons why Manitoba is vacation country.

TRAVEL MANITOBA GENERIC ADVERTISING—1988

MARKET	Medium	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.
MINNEAPOLIS	TV INSERT			■	■	■					
N. DAKOTA	RADIO INSERT				■	■					
MANITOBA	TV RADIO INSERT			■	■	■	■				
SASK.	RADIO INSERT				■	■					
N.W. ONT.	RADIO INSERT					■	■				

SPECIALTY MARKETS

In addition to the geographical target markets, psychographic markets have also been defined, and specialty advertising will be aimed at particular groups—anglers, the travel trade, meeting and convention planners, and those who may appreciate the range of top class cultural activities available in Manitoba. Special attention will be given to attracting meetings and conventions, building upon the success of Rendezvous Canada and Meeting Planners International conventions during 1987. Advertising to these groups will be in the form of inserts in magazines aimed at the particular target markets, combined with participation in industry trade shows. The angling insert has already run in targetted angling magazines in North America.

Print advertising will be coded and responses will be tracked to build a data base to help to define future campaigns and promotions, and to provide a source of tourist information for targetted direct mail campaigns.

REVISED PUBLICATIONS PLAN FOR 1988

The restructuring of departmental publications in 1986-87 saw the introduction of Travel Manitoba consumer publications in an integrated series package. The cornerstone of this new publications series was the "Vacation Planner" which acts as the jumping off point for information on Manitoba's eight designated tourism regions.

With a view to fine-tuning the new publications series for 1988 and beyond, several publications have been amalgamated into a more comprehensive user-friendly form. Changes for 1988 are as follows:

1. The Manitoba Vacation Planner is expanded to give greater regional coverage and to also include a French language information component.
2. The Manitoba Fishing Adventure and Master Angler Awards books combine to provide trophy and recreational sports anglers with a comprehensive picture of Manitoba's angling attractions and most productive fishing waters. This publication also includes information in French.
3. The Accommodations and Travel Services Guide links with the Lodges and Outfitters Guide in a flip-style format thereby giving Manitobans and visitors alike a fully integrated detailed information package on Manitoba's tourism facilities. In addition this revised publication also includes a French language information component.
4. The Parks Guide is updated and issued in conjunction with the Outdoor Adventure Guide. Once existing stocks of these two publications are exhausted, they will be combined into a single outdoor nature self-education publication. Production is planned for mid-summer 1988.
5. The very popular Events Guide continues to be published twice yearly but will now include information in English and French where applicable. These changes are in large measure due to the outcome of continuing consultation with the tourism industry. In addition, special consideration has been given to consumer-reaction to the new publications series.

A key aspect of the 1988 publications has been a more direct linkage of cover designs for all Travel Manitoba publications with the entire 1988 Advertising Program. This will ensure greater Marketplace visibility and ease of recognition for consumers in all designated markets.

INFORMATION SERVICES AND INDUSTRY LIAISON

In addition to Travel Manitoba's use of both wide-exposure and specialized media to disseminate the province's tourism message through advertising and promotional activities, there are also other vital information and communications goals to be met. To this end the department provides tourism enquiries with specific and detailed responses and assistance. Claims for quality and value in the provincial travel system are regularly tested and verified to ensure that they are reasonable and accurate. In achieving the goal of an integrated Tourism Facility Information System, use and performance will be increased.

A key component of the information service system is the maintenance and operation of Travel Manitoba's year-round and seasonal travel information centres. This will be spearheaded by a major remodelling and improvement of the Legislative Building Tourist Information Office, making it very attractive to visitors. Linked with this new look will be a new Travel Counsellor uniform for staff, giving greater visibility and a more service-oriented appeal.

The provincial role will be to be develop, operate and maintain tourism reception centres in strategic locations, including primary access points and other high access areas including:

- Winnipeg West
- Winnipeg East
- West Hawk
- Emerson
- Peace Garden
- Man./Sask.
- Shilo
- Legislative Building
- Museum of Man & Nature
- Two Mobile Units

The program will provide state-of-the art technology for information dissemination at the provincial centres and at Lower Fort Garry, and in Shopping Malls/Mobiles/U.S. venues. The Department is also exploring the development of a City Centre facility as part of the downtown Winnipeg redevelopment project.

Staff training and technology support will ensure a constant upgrading of services, while integrating with regional TIAM centres through seminars and statistics gathering.

A signage program is being undertaken, making access to information centres easier and heightening awareness of provincial attractions.

The Resource Centre operated in co-operation with the Manitoba Hospitality Training Council, identified training needs of the industry. This resulted in an improved method of program delivery. Resource Centre Material is now part of the Technical School Distribution System. This will encourage training in remote regions via extension progams.

The Department is participating in a consultative process with industry representatives in order to modify acts and regulations pertaining to the processing of licenses and the Star Rating System.

Plans have been developed to encourage accommodation facility upgrading. This program is designed to improve the standards of new and existing operations. Travel Manitoba's computer travel information system will continue to grow in 1988, as the Department seeks to improve the quality of information available to tourists. The objective is to develop and maintain a user-friendly information support system using state-of-the art technology and software to link information stations with accommodations establishments. This project will allow people direct access to existing reservation systems.

DEVELOPMENT STRATEGIES

Broadly stated, the strategy for both short and long-term product/plant development is to direct development efforts toward the dominant resource strengths that have been identified for each region. The primary focus is on developing new and expanded facilities with continuing concentration on the clustering of development in the primary destination areas of:

- Winnipeg
- Lake Winnipeg Beaches/Hecla Island
- Eastern Precambrian
- Riding Mountain/Duck Mountain

and in the development of the specialty products that cater to the following markets.

- Sport Angling
- Travel Trade
- Arts and Culture
- Meeting & Convention

Our strategic priorities are on the planning and development of major new well-themed urban and rural attractions, expansion of existing and development of new events, development of four-season resort facilities, specialty market product development and the further improvement and expansion of our existing accommodation and attraction facilities.

Development counselling is provided by trained consultants who assist owners in the expansion of their existing operations. New developers are provided with extensive consulting assistance in the planning, feasibility analysis, financing and marketing of new attractions, resorts and specialty market facilities that fall within these tourism development priorities.

Through the use of computerized simulation models, consulting staff are able to provide current operators and other new developers with a quick analysis of the potential for investment in new or expanded facilities.

For viable development projects, tourism consulting staff provide direct assistance in the development of proposals for funding of tourism projects, using such resources as Tourism Development Agreement, the Provincial Venture Capital Program, as well as other federal and provincial funding programs.

In 1987, in conjunction with TIAM, the tourism development section hosted the second provincial resorts conference. Plans for 1988/89 include the hosting of other specialized seminars, such as a conference designed to assist specialty market operators expand into new market opportunities.

Another new initiative in development is the promotion of investment opportunities in new quality attractions and facilities that will meet the current and future market opportunities discussed earlier. Incentive funds are available through the Canada/Manitoba Tourism Development Agreement to stimulate investment in new or expanded facilities that will increase tourism visitation in the years to come.

WINNIPEG

The regional strategy for Winnipeg is to encourage visits from all market segments by enhancing Winnipeg as a major year-round travel destination, through the development of attractions that build upon the cultural, transportation and agricultural strengths of the province.

The Department will continue to provide assistance in the development of several major new projects identified in the Winnipeg Attractions Study. Priority will be given to projects which have considerable tourism impact in the overall Winnipeg development strategy and which complement Winnipeg's potential and existing attractions.

Travel Manitoba will provide planning and feasibility study assistance to major public or private attractions that will significantly contribute to the province's ability to attract international and interprovincial markets.

INTERLAKE

The regional development strategy for Manitoba's Interlake is intended to stimulate extended use and greater day-use by the primary mass market segments. Tourism volume will be primarily in the summer months and secondly in the winter season.

Development will centre on the establishment of a wide range of accommodations and services, and the development and expansion of four-season, multi-recreational resort facilities in the Lake Winnipeg Beaches and Hecla Island destination areas. Emphasis will be on the beach resources which will be complemented by entertainment and recreation facilities, which were prominent features of this area at one time. The establishment of new or upgraded attractions should expand the opportunities for additional private sector investment in the region.

In addition, Travel Manitoba will continue to explore new opportunies for specialty market products that are consistent with the region's resource base.

EASTMAN

The primary emphasis in the Eastman region will be on the development and expansion of a wide-range of water-based facilities with associated accommodation and services, and the development of four-season resort communities in the Eastern Precambrian/Eastern Beaches Destination Areas.

The attempt to increase daily use and visits of more than three days by the primary market segments will be a primary development strategy in the region. The development of four season resort communities is intended to increase tourism volumes in the shoulder and winter seasons.

The Department will assist potential resort communities in the development of new wilderness adventure, naturalist, and angling and hunting products, to meet increasing demand for these specialty products. In addition, the Department will provide research assistance and develop additional assistance programs to allow existing resort operations to expand and improve their facilities.

NORMAN

The proposed development strategies for this region are intended to increase extended visits from Secondary Specialty Markets through the development of quality outdoor recreation specialty market facilities.

Primary emphasis will be directed toward the development possibilities of the premier outdoor recreation area of Cranberry Portage/The Pas region and the unique natural and historical resources of the Churchill region.

Existing resort facilities in the region will be encouraged to expand and improve their current facilities and to expand into new specialty market areas such as canoeing, rafting and trekking. Research will be undertaken toward the development of our new or major expanded specialty market attractions that build on unique cultural and historical strengths of the North and complement private initiatives.

Further product research will also be undertaken into sub-specialty product development opportunities such as bird watching and other specialized nature acitivities.

PARKLAND

Travel Manitoba's intentions for this region are to stimulate short-term use by the rural touring market and the outdoor recreational market by expanding (on a limited basis) attractions, events and facilities. Particular attention will be paid to expansion of existing attractions and facilities within the Riding Mountain and Duck Mountain Destination areas.

Plans include the continued promotion of expansion and redevelopment of existing resort facilities, particularly redevelopment into four-season multi-recreational facilities.

The Department also proposes to research and develop new or expanded attractions that build on the natural and cultural strengths of the region.

Westman/Central Plains/Pembina Valley

The Department will encourage short-term and greater day-use in the provincial rural tourism market by upgrading and promoting tourism attractions and events. This is to be achieved by emphasizing the historic and agricultural strengths of the region and by developing themed auto-touring routes through the region.

The Trans-Canada Highway Corridor will be developed as the primary travel corridor by providing a wide range of tourist accommodation and tourism services in the urban centres. By developing and upgrading attractions, along with providing a high level of tourism orientation and information services, auto touring traffic can be directed into the urban centres of Portage la Prairie, Brandon and Winnipeg.

In addition to continued assistance to developers and community organizations in planning and feasibility studies for packaging of developments, Travel Manitoba intends to provide continued consultative services to operators and potential developers in the development of projects which demonstrate strong tourism potential.